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ABSTRACT

The school development office, the part of the school that interacts with the outside community, is necessary to facilitate community involvement and support. Financial limitations that restrict the development staff to one person necessitate the creation and implementation of an organized, effective development plan. Chapters in this guidebook offer suggestions for creating a one-person development office, generating financial support, establishing a public relations program, enhancing student recruitment strategies, and improving director effectiveness. Appendices include samples of a job description for a director of development and of a successful phonathon campaign correspondence. (LMI)

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The One-Person Development Office

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The One-Person Development Office

by Anita Stangl

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Table of Contents

About the Author i

Acknowledgements ii

Foreword iii

Introduction iv

Part I The Basics: Getting Started

Choosing a Director 1
Relationship of the Director and the Principal 3
Job Description 5
Setting Up the Actual Office 5
Expectations for the First Year 6
Building on the Mission and Goals 7
Identifying the Constituency 8

Part II The Funding Component

Annual Giving: Direct Mail 11
Annual Giving: Parent Pledge 14
Annual Giving: Phone Solicitation 16
Annual Giving: Direct Solicitation 18
Planned Giving Programs 20
Foundations and Corporations 21
Fundraising 23

Part III The Public Relations Component

The Newsletter 25
Local Media 26
Creating Public Relations Material 27

Part IV The Recruitment Component

Visiting Feeder Schools 31
Open House 33

Part V How Does the Development Director Thrive?
Know the Priorities 35
Utilize Volunteers 36
Create Other Support Systems 37
Have Realistic Expectations 39

Appendices 41

About the Author

Anita Stangl is the Director of Development and Public Relations at Presentation High School, San Francisco, where she began the school's development office in 1983. As director of a one-person development office, she created funding and public relations programs and built an extensive student recruitment campaign. Ms. Stangl has worked with other recruitment and development directors in the San Francisco area to promote Catholic education and to give support to development programs, and from 1989-1990, she chaired an Archdiocesan group of development and admissions officers. In addition, Ms. Stangl belongs to several business and community groups and was recently named a Paul Harris Fellow by the San Francisco Rotary International in recognition of her service to the community.

A native of the San Francisco area, Ms. Stangl earned both her B.A. and M.A. degrees from the University of San Francisco. She began her career at Presentation High School in the English Department where she served as department chairperson for seven years and earned a fellowship through the National Endowment for the Humanities for her work with student theater productions. Ms. Stangl has also taught part-time at the community college level.

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Presentation High School, San Francisco, has been a wonderful place to begin my career as a development director. I must thank those individuals who had the faith in me to start the development programs in the school and who encouraged me as I expanded them. Pam Bevilacqua, who was the school's principal for three very important years of the development effort, supported my decisions and efforts and provided the type of leadership that allowed me to continue to see the big picture rather than be bogged down by the petty details of the work. Anne Bellan, who currently is principal, has continued the same tradition and likewise deserves my thanks. These women are leaders in the educational community and their faith in me and the development office as a whole has made my task much easier. I can only hope that individuals who assume the task I took on six years ago can receive this type of encouragement from their principals.

Foreword

The second publication in NCEA's new series on development, Anita Stangl's *The One-Person Development Office,* builds on the fine foundation provided by the first booklet in the series, Marta Monetti-Souply's *A Year-Round Recruitment and Retention Plan.* Ms. Strangl's publication responds to the need of many schools for practical information on how to establish comprehensive development efforts beginning with only one person as development office staff. This booklet provides information on how to establish funding priorities, how to begin the annual giving campaign, and how to incorporate the public relations and student recruitment components into the comprehensive development plan.

This new, updated series on development owes much to the first series initiated by Father Robert J. Yeager, former Vice President of Development at the National Catholic Educational Association. It was under his leadership that the first booklets in the original series were published between 1984 and 1987. These publications have served thousands associated with Catholic schools who have sought practical information about the facets of development. Ms. Stangl's manuscript maintains those high standards by providing a valuable resource which reflects her knowledge and expertise in the field.

I wish to acknowledge the following people who have acted as critical reviewers for this publication: Brother Milton Barker, FSC, Superintendent of Totino-Grace High School in Fridley, Minnesota; Dr. Thomas S. Edwards, PhD, Secondary School Department at NCEA; and Sister Kathleen Collins, SFCC, Assistant Executive Director, Elementary School Department at NCEA.

Mary V. Burke, SNJM
Assistant Executive Director
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Introduction

In recent years the word "development" has become a familiar term to the pastors and principals who head elementary and secondary schools in the United States. Development offices have sprung up as schools strive to remain financially solvent in the face of escalating operating costs. The development office and development director suddenly have become the hope of many schools which need to bridge the inevitable gap between the revenue generated by tuition and fees and the actual cost of running the institution.

The necessity of forming a development office and hiring an individual to assume the responsibilities of this position has become a reality for many institutions. Financial limitations frequently force schools to begin an office with a staff of one, and that individual often works only part time. What can a school realistically expect this one individual to accomplish? How can a single person organize a comprehensive program with only a minimum of support personnel? What can be accomplished in the first years? What areas should be targeted? These are some of the questions that will be treated in this publication.

For some administrators, the term development has a nebulous meaning. In an effort to generate immediate funding, the pastor or principal may demand that the development director turn to fundraising procedures that traditionally have generated extra revenue for the school, such as magazine or candy drives, auctions, walkathons or bingo. Although these types of activities generate dollars, they are *not* the focus of a well established development office. The term development has a much broader meaning. Traditional fundraising activities should be assigned to another staff

member while the development director focuses on an annual giving campaign, public relations and student recruitment programs.

It is best to think of the development office as the part of the school that interacts with the outside community. The basic goal of the development director, especially in a one-person office, is to create and sustain adequate channels for community members to become involved in the institution and to support it.

In order to cover all of the areas that must be addressed by a development office, this booklet is divided into four sections, addressing 1) the basics involved in setting up a development office; 2) how to raise development dollars; 3) ways to establish the schools public relations program; and 4) approaches to student recruitment. The purpose of this booklet is to give a basic guideline to schools which need to set up successful development programs beginning with a staff of one person. Some topics introduced in this booklet are covered in much greater depth in other NCEA publications.

I had taught at an all girls Catholic high school for fifteen years before I assumed the position of development director, and although I knew nothing about development, I knew everything about the school. While taking on the responsibilities of the office, I still taught two and a half classes, remained as chair of the English Department and had, as support personnel, the office secretary who typed my letters.

Six years later, our development office employed a full-time administrative assistant and a part-time student recruitment officer. I was entirely out of the classroom and worked full time as director of development. The school had established an annual giving program and a parent pledge program, conducted a successful phonathon campaign, involved members of the community in a development board and former parents in a "Friends" club, and had targeted individuals for personal solicitation. In addition, our institution developed promotional materials, sent a quarterly publication to 7,000 individuals connected to the school, and established a recruitment program. I am presently working with the alumnae moderator to create programs that will interest our alumnae and reconnect them with the school.

These changes came about gradually. I am no longer a one-person development office because our programs have succeeded and because expansion of the office was an inevitable result of our success. As the programs described were implemented, the need for additional development personnel became apparent, and the financing for a larger office staff was generated.

PART I
The Basics: Getting Started

Choosing a Director

Before opening a development office, a school must first hire a director of development. In order to save money, a school may think that the principal can assume the role of development director in addition to his or her other responsibilities. This expectation is often unrealistic because the duties of the development director increase dramatically in a short period of time.

Ideally, the individual selected for this post should have some familiarity with the field of development; prior experience, however, is not a prerequisite. Many schools have found that by hiring from within, they can find an individual who already possesses an intense loyalty to the institution in addition to talents which are applicable to the field.

Most importantly, this individual must have strong communication skills and research abilities. Many of the tasks involved in development demand written communication, and the ability to command the English language is of primary importance. As a representative of the school to the outside community, the individual must be able to speak—both with a prepared text and in an extemporaneous manner. Equally important is the ability to research. Much of the success of a development program depends on researching individuals as potential donors and ascertaining their financial background, their relationship to the school, their commitment to Catholic education, and their philanthropic involvement. The development director must become familiar with his or her constituency as quickly as possible.

The development director represents the school to the

outside community, and the ability to deal with the public tactfully and competently can greatly affect the community's view of the school. Since the responsibilities of the development officer are varied, the individual hired should be organized but also creative. An "up-beat" personality and vitality are definite pluses. The director must also dress in a way that is consistent with accepted business attire.

The position can be filled equally well by a lay person or a member of a religious community. However, whoever is hired must have the freedom to handle a flexible schedule. There often will be evening and weekend commitments, and during times of intense activity the work week will extend beyond the normal forty hours.

As far as professional training is concerned, the director should either have some previous experience in development or the school should make some provision for training through a variety of approaches. This provision can take the form of financing the individual's basic development education. Many comprehensive workshops on the basic principles of development are offered at regular intervals in major cities in the United States. The services of a consultant can also be contracted to help a beginner set up a program. Or a development director from another school may agree to act as a mentor. In addition, there are numerous books, tapes, and training videos available. The NCEA provides sessions during the four day Development Symposium at the annual NCEA convention as well as sponsors an elementary school development training program. Also, universities offer relevant classes in their master's programs in educational administration. All of these approaches can help the development director acquire the knowledge and skills to direct the development office, and to recruit effective volunteer leaders in the schools development program.

Finally, the director must have a true belief in and dedication to Catholic education and its importance in the lives of the members of the Catholic community. He or she must have a vision for the direction of the school in the future. These personal beliefs sustain the director during the stressful periods which inevitably occur in this job. This conviction, along with a commitment to the school, is essential for success.

Relationship of the Director and the Principal

In order to help the development director achieve the goals set for the year, it is imperative that there be open communication with, and support from the principal of the school. The director needs the trust of the administration, including the pastor, in order to work hand-in-hand with the governing group, i.e., board of directors, education committee of the parish council, development council, or the school board.

The director should meet on a weekly basis with the principal and should be informed of any important issues facing the school. Prescheduled weekly meetings allow the director to cover a variety of areas of concern:

- soliciting support for projects;
- gathering data which can be used in the writing of grant proposals;
- discussing the strategies for donor contacts;
- preparing the principal for involvement in specific donor solicitation;
- planning meetings with the governing group regarding development;
- appraising student recruitment goals and retention needs;
- planning for the advisability of and methodology for short and long-term projects.

Since a one-person development office by its very definition means that the development director must work alone, these weekly meetings can generate ideas and allow the director to remain on target with projects. Access to the advice of the pastor and the principal becomes an important resource for the director.

Typical questions that need to be discussed if the development effort is to be successful include:

- Is this the right time to make the solicitation contact with Mr. and Mrs. X?
- Are the tone and content of the appeal letter appropriate?
- How can teachers be involved in generating ideas for grant proposals?
- How can parents help in the recruitment process?

The administration must be willing to give input and keep the director informed about school events conducted under the auspices of other organizations such as the Parents Club, Boosters and C.Y.O. Open communication lets the administration know the concerns of the development office, as

well as the problems and issues which need to be addressed.

In addition, regular meetings keep the development director accountable to the administration for the development programs. Projects must be completed on schedule. The administrator should be aware of the contents of major mailings to parents or alumni. The format, message, and tone of these communications must be consistent with the public image the school wishes to project. Without guidance, especially during the first year, a director working alone can make mistakes that could easily be avoided. Also, it is easy to lose one's balance in setting priorities among the many tasks. Meetings help the director be accountable for achieving specific objectives in addition to maintaining the long range goals of the entire program.

Weekly meetings also make it easier to evaluate the overall performance of the director. The purpose of evaluation not only lets the director know that he or she is performing adequately but also gives direction for the future. Recognition for a job well done nurtures job satisfaction and reinforces dedication to the institution. By being a part of the process, the administrator can understand the problems which have occurred and help the director evaluate outcomes.

Not every project undertaken will be a success. In the process of evaluation, the director learns and applies the knowledge gained experientially to the next project. For example, in examining the reasons why the alumni did not reach the expected dollar goal in the annual giving campaign, the director and the administration may decide that the project described in the solicitation simply was not of interest to that constituency. This analysis can lay the groundwork for a different approach the following year.

Finally, the salary of the director and the operational expense of the development office should be included in the overall budget for the school. Since this position is extremely important for a school and requires substantial time and effort, the salary of the director should be closer to that of the principal than to that of a teacher. Unless the school has a previous record of successful development, the director should not be expected to raise funds that will fully cover all the direct expenses in the first year. Also, many of the costs incurred by a one-person office apply to public relations or to student recruitment. Building a solid and sustainable development effort is a multi-year prospect.

Job Description

Once the governing group and the principal have decided that a development director should be hired, they must write a job description which is reasonable, clear and which incorporates measurable objectives. The major categories of responsibility for the development director of a one-person office are all complementary and include an annual giving campaign, public relations, and student recruitment. The cultivation and solicitation of donors, the development of public relations materials, and a broadened outreach for new students are all activities of immediate concern. How to describe and prioritize these tasks forms the basis for a job description. (See Appendix A: Sample Job Description.)

In prioritizing tasks, the major amount of time (50%) should be spent on the annual campaign, including researching and writing grant proposals. Twenty percent should be spent actively recruiting new students and working on promotional events such as the Open House. Another twenty percent is needed for publications and the development of public relations materials, including any public relations special events. The remaining ten percent is used for overseeing record keeping, acknowledgements, solicitation reports and all other correspondence. If enrollment is the major concern of a school, these percentages should be adjusted to reflect the primary importance of student recruitment and retention.

Setting Up the Actual Office

The development director must have an office, not the nearest available closet! This office space should be visible and accessible to students, teachers, alumni, administrators, and the outside community. While expensive furniture is not necessary, adequate equipment is. A telephone and a good typewriter are minimal requirements. A personal computer not only makes the job easier but allows the director to be more efficient. The appearance of any communication from the development office makes an impression on the individuals receiving it and hence should always look professional. For example, the development office should design and print stationary and thank you notes with an appropriate heading and the school emblem.

A system for record-keeping must be planned and main-

tained. These records as well as communications from other schools concerning their programs (e.g. annual reports, newsletters, and invitations), are materials that should be kept in the development office, necessitating filing and storage space. The more information the office has on the school's constituency, the easier the researching of prospective donors becomes. People like to be remembered and the more that is known about the members of the alumni association, the more effective the school can become in its personal communications with individual members. All of this involves recording, filing and tracking.

Finally, the development office must have data concerning the school within easy access. The development office often needs information concerning the socio-economic makeup of the school, the number of students receiving financial aid, the student/teacher ratio, the budget, and all the various development histories connected to the school. These statistics along with other data must not only be made available to the director; they form the mainstay of the information recorded in the development office.

Expectations for the First Year

What happens in the first year of a development effort forms the basis for future activity. Of immediate concern is laying the groundwork for the annual appeal. Depending on the condition of the records, very often all that can be done the first year centers around gathering data so that a workable mailing list can be computerized. If accurate records are already available, an annual appeal can begin with a comprehensive mailing campaign. The director, in conjunction with the principal, needs to establish realistic dollar goals for that campaign and to begin the formation of a leadership group which will assist with direct solicitation.

During the first year the director should research local foundations and submit proposals for immediate specific needs such as scholarships. Some of these foundations are easy to approach and are well-known to other schools. With grant proposals, record preparation and the possible implementation of the annual appeal, more than enough development projects have been generated for the first year.

Another major area of responsibility for the director is the school's recruitment program. For that reason, public

relations materials need to be created during the first year and a systematic way of recruiting students established. Contact must be made with prospective students. Visiting feeder schools, disseminating information to youth groups and initiating information programs for pre-schoolers and/or eighth graders all help create the public image of your school in the community. A creative, up-beat Open House must be organized and attractive public relations packets should be developed. Contact with the local press must be established and press releases sent on a regular basis. These public relations and recruitment activities demand a tremendous amount of time, and in combination with the projects that relate specifically to development, they create the focus for the first year.

Building on the Mission and Goals

The development program will utilize the school's philosophy, mission statement, and five year plan. If these do not exist, the governing group and the administrator must work together to create them. The importance of such formalized statements cannot be overemphasized as they give direction for the entire development program. What exactly makes your school unique? Is it dedicated to the teaching of the poor, the middle class or the affluent? Does the school cater to those students who are academically talented, to a diverse student population in terms of intellectual ability, or to those students who have problems with traditional educational programs? Does the philosophy of the school state that students will be educated in their responsibility to their community? Does the school educate only girls or only boys or both sexes? What additional services does the school feel committed to offer students beyond the regular curriculum and why?

Obviously, the main task of any school is the education of its students. But there are many differences in the way this task can be approached, and the school must articulate why it is distinct. This information is essential, especially when approaching prospective donors. Also, a mission statement and/or written philosophy serves as the backbone for all the written material about the school. A long-range plan outlines future goals and reinforces the quality, stability and viability of the school.

Identifying the Constituency

One of the most important tasks of the development director is to define the constituency of the school, the potential supporters of the development effort. Which groups and individuals are connected with the institution? The most obvious support groups for a school are the parents of present students, the alumni, past parents, parishioners, and members of the community who are philanthropic and who have an interest in Catholic education. These groups must be contacted and their connection with the school established or reestablished.

Once the constituency is defined, further research can explore which of these individuals should be contacted to form the core of a volunteer group leading the development program. This group could be called the Development Council, a Blue Ribbon committee, or the Principal's Leadership Circle. These volunteers need to be dedicated to the school, be able and willing to financially contribute, have connections with the business community, and be willing to use their contacts to solicit funds for the school. If the school has a board, this development group is usually a sub-committee of the board, with some board members and other outside volunteers. If the board does not have some members of affluence and influence, this development council can be designed as a separate group with only a liaison representative to the board.

It is critical to select carefully individuals who have and will use their influence in drawing support from the community. They should represent a variety of professions. This kind of volunteer group is usually not a policy-making body, but one that advises. Its major roles are to expand the constituency of the school, to assist with donor research, to provide leadership for the annual giving campaign, to solicit donations, and to make the school better known in their own circles. All schools, be they in an affluent suburb or an inner city area, can successfully develop this kind of leadership group.

The relationship of the development director to the governing board and to the sub-committee for development is very important. The director should be able to rely on the board to support the various programs sponsored by the development office. Members of the policy-making body should also be called on to make personal contributions and to use their connections with the business and philanthropic community.

The other groups that make up the constituency of the school, parents, alumni, and past parents, are vital to the development effort. They have a natural connection with the school and are the major groups to solicit in the annual giving campaign, an activity which in most cases provides, beyond tuition, the major funding for the school.

PART II
The Funding Component

Annual Giving: Direct Mail

Having identified those individuals who have a natural relationship with the school, the development director should begin to establish ways to solicit support. An annual giving campaign can be a first step in this process. As indicated by its title, the annual giving campaign is conducted every year.

The simplest and most obvious way of contacting a broad constituency is through direct mail, for which you will need a mailing list. The extent of the mail campaign is based on the number of correct names and addresses. Hopefully, this list will already be in the development files and ideally will be computerized. If there is no list, volunteers can help with gathering information as well as with entering any existing mailing data into a computer system. Those individuals who have the potential for larger donations should be visited personally. The people designated for a personal solicitation call should ***not*** receive the direct mail solicitation letter. Their names should be removed from the mailing process.

The next step requires the composition of an effective letter of appeal. There are two approaches which can produce results. First, a project or cause may be targeted for the annual giving. Examples of a project approach are the need to finance major repairs to the building, or to fund a computer lab or a performing arts program. Scholarships are one of the most frequently used specific reasons for an appeal to alumni. Not everyone, however, "buys into" a specific project appeal. Their interest in the school may be

broad-based. They may have no interest in the football program. They may not understand the importance of computers as an educational tool or be tired of being asked "to fix the roof."

A second and more typical annual appeal letter is one that brings in additional support for the cost of general operations. The annual appeal for operating expenses is important because it generates general operating support. In the last twenty years, the costs of running a school have escalated dramatically. A major factor in increased costs is that the donated services of the religious no longer subsidize the schools. Most schools try desperately to maintain a reasonable tuition, and the direct mail solicitation can bridge the gap between the actual cost of educating the student and the price of the tuition. Explaining these facts to the constituency of the school helps to generate funds for operating expenses.

The one-page letter for the appeal should include the following information:

- the dollar goal of the campaign,
- designated uses for the money raised,
- timeline for the campaign,
- methods of payment on the amount pledged,
- reference to a phonathon contact to follow,
- suggested gift amount.

If the school has the computer capabilities, the letter should suggest a gift amount compatible with the person's resources. For example, within the mailing sent to parents, there may be three different letters: one requesting a gift in the range of $5 to $25; another for a gift of $25-$100; and a third for a gift of $100 to $500. Letters without a suggested gift level tend to produce fewer dollars.

Avoid such language as the following: "Anything you can do will be greatly appreciated;" "No gift is too small;" "If everyone sends X amount, we'll make our goal;" or "Every little bit helps." Instead state, "We ask you to respond generously;" "Catholic education deserves our finest response;" "In making your gift consider the lifetime impact of a Catholic school education;" or "It takes many of us to make quality Catholic education a reality."

Another consideration in writing the annual giving letter concerns the tone of the letter. The one feeling that must not be conveyed is that of desperation. Although a

"desperate" appeal may work in the short term, in the long run it can have negative results for an organization. Generally, individuals, corporations and foundations prefer to fund winning causes. Some recipients of major grants are universities with extensive endowment funds. They gain this support in part because their alumni and other supporters have demonstrated their commitment to the institution.

Another concern involves the appearance of the letter and the reply envelope. Shabby paper, poorly-reproduced copy or grammatical mistakes make a poor impression. It is important to spend the few extra dollars to make the appeal "appealing." On the other hand, an overly elaborate and costly mailing can also have a negative effect. If an institution can afford very expensive public relations materials, perhaps it does not really need additional revenue.

It is the responsibility of the development director to compose an effective one page letter and to arrange with typesetters and printers to make it look attractive. Ideally, these types of services can be donated by members of the constituency, but even if they are purchased, the appeal will certainly cover these costs.

The return envelope which accompanies the letter should classify giving level options. Specific gifts can allow a donor to join a certain "club," the names of which should have some relevance to the school. The club that indicates the highest amount designated might be called "The Principal's Circle." Later, the school should list the donations in a publication, noting the names of donors under the appropriate club. Upon receiving any donation, a thank you card should be sent out within three working days. Having cards printed up with a space left for the amount saves time but still includes the principal's personal signature. Larger donations, however, should be recognized by a personal letter signed by the principal. Some schools also have the chairperson of the annual giving campaign co-sign the letter with the principal.

Many high schools design an annual giving campaign brochure to accompany the appeal letter. The brochure, usually developed around a specific theme, 1) states the campaign dollar goal and purposes; 2) reminds donors of corporate matching gift programs; 3) asks for a response; and 4) includes a listing of the leadership group. The brochure conveys a sense of the school through photographs of the students, ***not*** the school buildings, and a capsule state-

ment of the school's mission. The campaign is therefore placed within the larger school perspective. Brochures are particularly helpful with business contacts.

Sending the annual appeal letter first class has a number of advantages. Bulk mailings are often delayed, and individuals tend to open correspondence which is postmarked with a first class stamp while discarding bulk mail without even opening it. However, if the director decides to send the communication by bulk mail, the use of a professional service for processing the mailing is well worth the time saved. Although volunteers can be used for this activity, the expenditure of time and energy for a large mailing is usually not worth the money saved.

The first time the letter goes out, the development director should not expect an avalanche of returns. But the annual appeal will build year after year, and as the alumni and parents become better informed and involved with the school, their generosity will increase.

Annual Giving: Parent Pledge

Parents should be included in the annual giving campaign. Sometimes there is a hesitancy about soliciting additional funds from parents, as they already pay tuition. The rationale for approaching parents, however, can easily be given. First, their children are the direct recipients of the benefits of your education. Obviously, the annual giving campaign allows present programs to remain in effect, thus benefitting the students who attend the school. Second, the economic resources of parents can differ greatly from one another. One set of parents may easily meet the expenses of tuition, while another set of parents may barely be able to afford the cost. Obviously, the parent who is more affluent can donate more and should be invited to do so. The parent who has financial difficulty paying the tuition may opt for a smaller contribution amount still indicating a desire for involvement in the school's development process.

When dealing with the parent body, the concept of a pledge can be very appealing. Parents can be billed over a period of time, thus helping make payment easier. A data base program can be purchased at moderate cost and allow the billing to be processed and recorded by computer. No

parent should be forced to pledge, but all should be urged to give something. Unlike tuition, a paid pledge is tax deductible because it is considered a donation. The support of the parent group indicates to outside organizations such as foundations and corporations that the parents are so concerned with the well-being of the school that they are willing to donate above and beyond the cost of the tuition. This type of support impresses outside groups and tends to make them look favorably on the school for funding considerations.

Some schools send the annual appeal letter to parents, while others hold a mandatory parent meeting to explain the funding base of the school and to launch the parent appeal. If a meeting is held, parents receive the pledge materials at the meeting. They then are approached by their peers who believe in the program and who already have given. After this initial mandatory meeting of the parent body, some form of follow-up by the development office is imperative.

Some schools conduct an annual pledge program, and others ask that parents make a one time pledge to cover all of their child's years at the school. The annual pledge program has some distinct advantages over the one-time-only pledge program` covering all of the student's years at the school. These advantages include:

- gift amounts based on the school's needs and the family's resources are adjusted annually;
- exposure to more parent leaders in the campaign occurs each year;
- preparation for a planned gift program is gradually built;
- identification with the school community strengthens annually;
- the educational program is explained and new programs are highlighted each year.

Whether the school mails the annual appeal letter or conducts a meeting, the parents can select one of several payment methods: monthly, quarterly, semi-annually, or yearly. It is the responsibility of the development office to consistently issue a billing statement. People do not pay if they do not receive an invoice!

Annual Giving: Phone Solicitation

The effectiveness of a direct mail campaign is limited. After all, many organizations use direct mail to obtain funding, and individuals are often inundated with unsolicited mail. It is much more difficult to avoid and respond negatively to a phone call. Ideally, the school will always use a phonathon as the second step in the appeal process for anyone who received the mail solicitation letter. A phone contact after the direct mail letter will usually double the amount of dollars that the letter alone would raise. As such, the phone call should occur within one to three weeks of the receipt of the letter.

A major requirement of a successful phonathon to a large constituency is a well organized approach. The development office must have a list of individuals to be contacted as well as their phone numbers. Obtaining those numbers may take a great deal of work before the organization of the event even begins. Once again, the director must be careful to remove from the phone list the names of individuals selected for a personal solicitation visit.

Sometimes, on the high school level, outside companies contact the school and offer to complete an alumni directory. They do not charge for this service. The school's responsibility includes providing the company with as current a list as possible of alumni addresses. The company then checks the addresses and locates correct phone numbers. After compiling the names and addresses of alumni, the company sells the directory to the alumni. The school is then given all of the data free of charge either on a computer printout or a disk. Information normally includes address, phone number, place of work, and work phone number.

When conducting the actual phonathon, the physical set-up for the event comprises one of the most important components for success. The volunteers must be seated so that they can see and hear one another. Phoning for a four-hour period can become very boring and discouraging if there is no feeling of comraderie among those phoning. Successes need to be mutually cheered and rude responses tempered by a sympathetic nearby volunteer. This type of an atmosphere provides great energy and allows the volunteers to have fun—a most important component.

No matter how restricted your budget, do not send a volunteer home with a list of names to phone. Do not

isolate your volunteers in individual offices. Spend the money to rent a large facility such as your public service TV station. Bring a phone hook-up into your school for several days, or secure the use of a large office such as a real estate office or brokerage firm that uses multiple phone lines.

Volunteers can come from the many constituent groups: current parents, alumni parents, faculty, or alumni. Alumni can be particularly effective in soliciting funds from their former classmates. High school students can augment the volunteers. Volunteers, however, must be trained. Prepare a sample script for them and let them practice on one another. This will make them much more comfortable when they begin to make calls. Ideally, this training should take place in a separate session before the phonathon itself. However, since time is a precious commodity, training often occurs in the half hour before the phoning takes place. Mailing instructions and a script to the volunteers ahead of time can help avoid some of the confusion.

After securing your volunteers and the place for the phonathon, organization of materials takes priority. The appeal letter mailed prior to the phonathon should have mentioned that the school would be contacting its constituency but that those who contributed prior to the beginning of the phonathon would not be contacted. Make sure that the phone numbers of these individuals who have sent in a donation or who will be personally visited (direct colicitation) are ***not*** included in the materials given to the volunteers.

Each volunteer receives materials for the contact: name, address, phone number, relationship to the school, and donor history. The first year, volunteers check names and addresses when phoning and record any pertinent information on the call sheet. With twenty-five volunteers phoning for four hours for three nights, approximately 4,000 individuals can be contacted.

A phonathon requires a great deal of preparation, but the results are very gratifying. A successful phonathon can be terrifically exciting for your volunteers as well. Reward your volunteers with prizes, good food, and lots of enthusiasm. Post the amount pledged at regular intervals so that they all can feel a sense of achievement. Make the event fun-filled, and all will win.

The next days will be busy with follow-up procedures.

Volunteers should receive thank you cards. Data on pledges and billing timelines need to be recorded. Ideally, everyone contacted should receive a written confirmation (see Appendix B: Phonathon Letters). These steps greatly strengthen the campaign and remind people of the professional and serious nature of the annual appeal.

Annual Giving: Direct Solicitation

The method of soliciting donations which can generate the most revenue and yield the highest percentage rate of success is direct contact. This is sometimes described as the 90/10 or 80/20 rule, meaning that 80 to 90 percent of the dollars raised come from 10 to 20 percent of the donors. A researched and planned approach creates the most satisfying results. Almost every school has within its constituency individuals with some degree of affluence. These members of the community who believe in your school and who could be invited to give generously in order to maintain and augment the school's programs are key to the development success. These individuals need to be researched and an appropriate strategy developed to approach them.

What are their concerns? Does the school have programs which might be of special interest to them? Have these individuals funded programs for other schools? Did they or one of their family have a special relationship to the school at any time in their lives? Do they have money to give? Do they have a history of giving to the school or schools in general? The answers to these questions are extremely important.

A list of individuals who may become major donors can be developed in several ways. The most obvious place to find information are the records of individuals who have given to the school or parish in the past. For example, if certain individuals consistently donate $500 or more each year without a visit, they can be approached to upgrade their gift. Those who give over $1,000 a year might be willing to consider a major gift such as a permanent scholarship. Information concerning the giving potential of these individuals can be found by checking the published donor lists of other local philanthropic institutions, reading the business section of the newspaper, and investigating their repu-

tation for philanthropy. Does the individual sit on the board of a foundation? Has the individual given considerable sums to other non-profit organizations? Speaking with people who know this individual personally will often be the most valuable source of information.

Once an individual has been identified as a potential donor, he or she should be approached by two representatives from the school. Two-on-one solicitation is the most effective method. The principal, pastor, or development director will represent the school. The other person should be a volunteer who can effectively represent the school's needs to the prospective donor. The chairperson of the campaign, a member of the Development Council, a parish leader, a member of the school board or of the religious community which owns the school are possible partners with the school staff representative. The decision concerning who will make the solicitation is often as important as what is asked. If an appropriate volunteer cannot be secured for the solicitation, then the two people to make the call should be the principal with the pastor or the development director.

A strong case for support should be prepared ahead of time. Very often the relationship between the donor and the school must be "cultivated," especially if the donor lacks a previous connection with the institution. The two individuals making the solicitation call must be equally informed and prepared for the contact. They can bring a prepared packet of materials or a video or slide show of the school. By doing homework ahead of time, those asking should have a reasonable idea of what the prospect can afford to give and what the donor's major interests may be. Within the conference a specific gift should be requested. Asking for too much is better than asking for too little. Once an individual has donated to the school, the likelihood is that the donor will continue to give annually. Very often it is advantageous for these donors to become involved in the Development Council, the alumni board, school board or other leadership organization in the school. There is often a direct relationship between the generosity of a donor and his or her involvement in the school and its activities.

Once a donation has been made, the school should acknowledge the donation. The school should expect to give public recognition to each donor. Often this can be accom-

plished by publishing the list of donors in a newsletter or annual report. If the individual endows a scholarship, it can be named after the donor. Sometimes, it is advisable to give recognition at a dinner or special event for major donors or to give the individual an award that reflects a person or motto important to the history of the school. If a donor does not wish to be publically acknowledged, this wish must be respected. But because current contributions are examples to others, donors should be encouraged to let their names be known.

Even if the constituency of a school is not affluent, it is important to solicit as many contributions as possible. The revenue generated by small gifts can be significant. Through the direct mail solicitation and the phone call to all but those who will be visited, the school makes every effort to contact the entire constituency and to involve and interest them in the school. These groups, parents, past parents, grandparents, alumni, parishioners, present and former faculty, businesses and foundations, together form the backbone of the development effort.

Planned Giving Programs

Interesting prospective donors in a planned giving program can produce very satisfying results for the school. Very often, prospective donors would like to be generous and endow a scholarship but are limited by cash flow circumstances. Giving these donors the option to annually subsidize one or two scholarships with the promise of endowing one through a bequest can be very appealing. They remain connected to the school in the present, and are secure in the knowledge that the effects of their generosity will continue after their deaths.

Schools can be made recipients of bequests in the form of property (with special tax benefits resulting) or securities. The school can likewise become the beneficiary of a life insurance policy. The donor's premium payments then become deductible for income tax purposes. A young donor who may not have an immediate family to support may choose the school as the recipient of an IRA or Tax Shelter Annuity. These options might be offered to those being solicited.

In all of these cases, tax laws must be taken into account. Therefore, the school should have an attorney specializing in tax and trust law available for consultation.

Foundations and Corporations

The application process for support from foundations is becoming increasingly competitive. In the United States there are presently over 24,000 grant-making foundations that distribute billions of dollars every year. As with soliciting funding from an individual donor, the first step in requesting support from a foundation is research.

When thinking of foundations, the names Rockefeller and Ford come immediately to mind. These foundations are important sources of revenue for many projects, but most likely they will not be interested in the needs of a small individual school. However, there are many state and local foundations which can be approached and often the projects or the needs of a small school are within their funding guidelines.

With some careful research it is easy to find which foundations focus on your particular project. The primary resource is the network of regional Foundation Centers which provide information and reference materials. By using the resources of the Foundation Center, prospective applicants can identify foundations and corporations which are interested in giving to education, religious institutions, or special projects. The Foundation Center can be contacted for the names of local libraries that have relevant reference books.

One of the most important reference books is *The Foundation Directory*, which lists over 5,000 foundations and summarizes their areas of interest. Also, very often there are small family foundations that give to local concerns. Talking to development directors from other schools or asking members of the governing board can provide leads to these foundations.

In writing a proposal for a foundation or corporation, a school must follow the guidelines carefully. By determining which specific projects a foundation prefers to fund, it is possible to formulate a proposal that will be of interest to its board of directors. Even with a well-written proposal,

it is useless to solicit funding from a foundation not interested in education or in the type of project described. The tighter the fit between guidelines and requests, the greater likelihood of consideration.

While occasionally a foundation may want to fund a project entirely, some prefer to donate only a part of the needed revenue. Sometimes a foundation will give a gift that must be matched by other donors. For example, if the proposal states that the school needs $35,000 for a computer lab, one foundation may make a gift of $10,000 and indicate that they will give the monies when the school matches the $10,000 from other donations. The giving policy for each foundation can be ascertained by a call to the foundation office. The staff will communicate such information and send a packet containing the guidelines for a grant.

If possible, a personal visit with the executive director of a foundation prior to submitting a grant proposal can be extremely helpful. That conference can clarify the appropriateness of the proposal. If you have several ideas, the conference can indicate which of your possible projects is most compatible with the foundation's guidelines. For example, a school may want to submit a request for a capital need such as a new boiler, and the foundation guidelines may allow for capital projects. In a conversation, however, you may learn that capital projects are a low priority with the foundation. That conference can save you the work of submitting a proposal to a foundation which is unlikely to fund your project.

If you send a request, a contact from your school (a member of the governing board, parent club or Development Council), may be helpful. Obviously, foundations allocate money on the basis of the validity of a proposal. However, a contact from your school who knows a foundation trustee can give that foundation another layer of information concerning the school.

Corporations likewise have giving programs. Some provide matching grants for employees who make contributions, and individuals who donate to the school should be urged to investigate their employee's policy concerning this practice.

Many large national corporations have a history of philanthropy, but tend not to fund individual schools at the

elementary and secondary levels. Smaller, local corporations should be investigated. With the present national emphasis on the relevance of the business community to the educational world, these businesses may be approached for funding or support. Sometimes, their guidelines urge employees to become involved on a volunteer basis. Occasionally, the business can be urged to adopt a school.

If the development director is willing to work with other schools in the area, sometimes a joint proposal can be written which would fit the giving policy of larger corporations. Of course, these proposals take time, cooperation among principals, and vision. For the development director of a small school, the time commitment for such a project must be evaluated in light of other responsibilities that may take precedence in the first years of the development office.

A final word of caution involves the tendency of schools to "blanket" the area with proposals for a project. In other words, the school applies to every single foundation in the vicinity for funding of a specific project. Usually a school identifies the other foundations it is approaching in the cover letter. Also some community leaders serve as board members of several foundations simultaneously and they will note the fact that this proposal is being submitted indiscriminately. It is better to investigate local foundations and concentrate on those that offer the best likelihood of funding. This practice allows the development director to spend more time on each proposal so that it can be as complete, as effective, and as persuasive as possible.

Fund-raising

A mistake that pastors or principals often make is to equate the terms development with fundraising. The tendency is to ask the development director to be virtually a special events coordinator, since these project generate funds. Often, however, this proves to be a short-sighted decision based on the immediacy of some event. In the long run, this emphasis on fundraising prevents the development director from conducting research and placing solicitation calls. The hours needed to coordinate volunteers for an event which generates $3,000 are hours which may have produced $10,000 ***annually*** because of the development

director's research and direct solicitation success.

Traditional fundraising activities such as candy sales or a magazine drive should be handled by another member of the school community, thus allowing the development director of a one-person office to adequately handle the broader scope of work. If a special event is to generate major revenue for the school, it requires untold hours of planning in order to insure its success, and would be better organized by another person.

Therefore, although these events and fundraising activities do generate financial support, the energy needed to make these activities successful is either not commensurate with the revenue generated, or requires so much energy that the development director will neglect recruitment or the annual campaign to coordinate the event. Therefore, they should not be the focus of the one-person development office.

If, however, the administration decides a fundraising activity or special event is to be conducted by the development director, the easiest type to facilitate involves the development office taking over an existing activity which has some potential but which may not be organized well enough to generate revenue. For example, the parent club may host an activity every year such as a theater event. They may be selling the event to a limited number of individuals. Expanding the event by tapping into the mailing list of the development office and by changing the focus of the marketing can make an existing event more financially successful. In this way it can be facilitated without demanding a disproportionate amount of time from the schedule of the development director.

PART III
The Public Relations Component

In addition to the tasks normally defined as "development," the director of a one-person office must also handle the public relations for the school. The better known the school is, the more likely the outside community will be aware of and support its efforts. The more the constituency knows about your school, the more likely it will contribute.

The Newsletter

As the major voice of the school to the outside community, the newsletter is an extremely important public relations tool. Through a newsletter, the school can explain current programs or achievements. Those individuals who have contributed to various programs can be given public recognition, and events can be publicized. "Classnotes" generally comprise one section of the newsletter on the high school level.

A school may choose to publish one newsletter for all of its constituency, or it may opt to complete one for alumni and one for parents. Considering the time limitations of a one-person development office, however, it is advisable to publish one newsletter that can be distributed to the entire constituency. The alumni should be knowledgeable of the school as it is today: What are the academic achievements? What is being taught? What are the ways of faith devel-

opment? Who are the students? What are the qualifications of the faculty? The newsletter provides an opportunity to teach others about the school, its mission, programs, activities and its future.

The newsletter should not read like the society section of the newspaper, nor should it be dominated by information about fundraisers. ***The newsletter is the main vehicle to educate others about the entire school profile.*** In addition to general school news, present students and their parents can look to the accomplishments of the alumni and feel a sense of pride in the success of the individuals who attended the school in the past.

The newsletter need not be an overly expensive or elaborate publication. But it must be neat, grammatical, and attractive. It is wise to check with several typesetters and printers in order to find the most economical way to reproduce your publication. Different types of printing processes can make a significant difference in the cost to the school. In-house designing and layout can be economical, especially with current desktop publishing programs. Sometimes, this service can be donated by an alumnus or parent who is involved in graphics or typesetting.

Upgrading to a better quality of paper often can be worth the expense because of the overall impression a heavier weight paper produces. No matter how limited your budget, make sure that the content is important and that the paper is well written, interesting and timely. Avoid errors, as they create a negative impression about the quality of education being offered at your school.

Local Media

Getting news of the school out to the public affects the way the school is perceived by the community. The name of the school in local newspapers serves as free public relations and helps promote a positive image for the school. Ask teachers to inform the development office if a student wins an award or is recognized for accomplishments. Send press releases to local newspapers concerning the achievements of students. Local newspapers regularly have a section devoted to education and often welcome information about your school and your students. The diocesan

newspaper will usually include notes on student accomplishments. If possible, send attractive, clear, black and white photos. The adage that a picture is worth a thousand words still holds true.

Other sources for informing the public about school events are your local radio and TV stations. Most stations have to allow a certain number of public service announcements (PSAs). These generally have very strict guidelines as to the length of the announcement and the type of event publicized. Check with your local radio and TV stations, ask them for their guidelines, and submit your information.

Sometimes it is possible to create a personal relationship with those who write the news. Developing a rapport with the individuals responsible for school news can be mutually beneficial. A phone call thanking a news person for including an article or perhaps a getting-to-know-you lunch may have pleasant ramifications for the future. Also, members of your governing board might help because of connections they have with someone in the press.

Church bulletins can likewise be effective in promoting school news and events. Be sure to get the information to the church office in time. A follow-up phone call can be effective in order to make sure that the material is being published.

Creating Public Relations Materials

In establishing a one-person development office, a primary step is the development of a packet of public relations materials. A school brochure must be created in order to promote the school. The brochure should be attractive, informative and concise. A summary of the philosophy or a mission statement is usually included, and reference should be made to the curriculum, faculty, and any special programs. If the brochure is to be used for several years, an insert can list the name of the current principal, important dates, the amount of the tuition, and scholarship information. Include several pictures of the students in action along with the copy to create interest.

A brochure should be designed to provide a general picture of the school. In addition, the development director may wish to compose a school profile and include it in a packet that contains supplementary information about

activities, basic curriculum, test score results, and special programs such as guidance or leadership training. Once again, emphasize what makes your school unique.

In marketing your school, knowing your audience guides your approach. For example, if you are trying to attract the type of student who definitely plans to go on to college, you should delineate your honors and advanced placement programs as well as the percentage of students who are accepted to four year institutions. If your curriculum has a strong business skills component, the advantages of this type of instruction should be noted, and employment statistics cited. If most of the parents work, does your school have a child care program that extends past the normal school day? Describe special learning activities and the way they help students achieve on standardized tests. What enrichment programs are available that can develop the unique talents of a child?

The message of the school must be geared to the major interests of each constituent group. For example, if family values are paramount, emphasize that your school traditionally has promoted a warm and caring environment. Or, if academics are foremost, highlight your successful academic achievements and test scores. A knowledge of your feeder population is vital in the formation of a successful marketing campaign.

Another way of marketing your particular school is to collaborate with the other Catholic schools in the area. You may choose to create a publication which can be distributed in the community that advertises the advantages of Catholic education in general. The cost of this type of publication is nominal, and it can be extremely informative. Ideally, schools can join together under the auspices of the diocese and create a multi-media ad campaign. This type of approach, however, demands a great deal of organization and can be extremely costly. Such a project necessitates a type of diocesan-wide cooperation that needs to be investigated. In any arrangement, the responsibility of marketing a school still devolves upon the development director of the one-person office.

In terms of the marketing component, the development director must realize that the public image of the school is what the outside community sees. It is up to the development director and the administration to provide leadership

in creating that image by working with the faculty and governing group. The development director prepares information profiles, creates attractive public relations materials and gets the word out through a variety of means that the school is "great!"

PART IV
The Recruitment Component

The task of recruitment generally falls under the responsibilities of the development director of a one-person office. The recruitment component flows from the marketing component because the knowledge of the public image of the school often determines what to emphasize in the recruitment process.

Visiting Feeder Schools

Traditionally one of the most obvious ways of recruiting students is to visit the feeder programs in the area. Phone the school or pre-school, set up an appointment, and come with materials which will be of interest to the age level of the students and to the program leaders.

Pre-schools usually arrange an information time for your school in the late afternoon, evening, or weekend when your elementary school personnel can be present to speak with parents of prospective elementary school students. Come prepared with colorful and attractive informational materials to distribute to the parents. In today's world where the majority of parents work, any after-school programs for both extended child care and enrichment should be described. The name and address of each prospective family should be recorded and the school should then send follow-up communications, thus building a connection with the

school and the parents.

Elementary schools may also choose to recruit fifth grade students when they are making the transition from the local public elementary schools to junior high schools. Often, the principal of the local school will allow Catholic elementary representatives to give a presentation during lunchtime or after school. Fifth grade students can be invited to spend the day at the Catholic elementary school. If names of parents can be ascertained, information and statistics concerning the benefits of Catholic education can be sent to the homes of interested students and their parents invited for a tour of the school.

For the high school presentation, a visit should last about half an hour. During that time you want to make a presentation that will entice the students to come and visit your school personally. A slide show or video about the school helps to create a visual image for prospective students. Since your own students tend to be the best spokespersons for your school, bring students along, preferably ones who attended the feeder school and who may still have a connection with some of the students. A training session for the students who accompany you can prevent any embarrassing moments and give confidence to your representatives. Be sure that the presentation is energetic and informative. The more your students and the students in the audience interact, the more effective will be your visit.

Important information can also be obtained at this time. Hand out cards so that prospective students can write down their names, addresses, and phone numbers. Ask them to list their special interests, favorite classes or planned high school activities. This type of data will allow you to personalize your recruitment procedure. You also might ask them for their birth date so that you can send them a card from the school celebrating their birthday. Handing out materials such as folders or book covers with the school name is another good promotional device. End the presentation by inviting the students to your Open House and making sure that they know the date and time.

The Open House

At an Open House, the school, whether it be elementary or secondary, invites the community to enter the school and see for themselves the benefits of that particular institution. The success of an Open House pivots around the preparedness of those who participate, namely the teachers, parents and students. A school must literally sparkle for the public.

Choosing the correct time is the first consideration. Generally after Mass on a Sunday proves to be the best choice, but circumstances beyond the school's control may influence this decision. For example, note any event which may interfere with participation. Is the local football team having a home game that weekend? Is there an civic event of great interest being held at the same time as the Open House? Have you chosen a three day weekend when prospective students may be out of town? Circumstances such as these must be taken into consideration when choosing a day and time. You may also want to hold an evening Open House on a weekday, although these usually are most successful when held in addition to one on the weekend.

The entire school population must recognize the importance of this event. Each department area or grade level should have representatives who are knowledgeable about the school's offerings as well as attractive displays of the subject matter being taught. Show outstanding examples of students' work. Academic departments may wish to produce videos or slide shows to visually demonstrate aspects of the curriculum. Student panels may also be used to inform the visitors about the school. In fact, since the best salespeople are often the students themselves, they should be included in all aspects of the Open House, from conducting discussions about the school from the students' point of view, to giving tours of the school, to demonstrating dramatic, dance or athletic talents.

The development director can direct the production of the Open House, but he or she cannot do so effectively without tremendous cooperation on the part of administration, staff, parents, and students. The results of an Open House should be a positive feeling about the school from all present, a substantial exchange of information, data secured for follow-up contacts, and an evaluation process for suggestions for next year.

A variation on the theme of the Open House is a visitors day for eighth grade students. Ask your present students to invite one or more eighth graders to spend a special day with them. Create a program for them that involves the entire school community in welcoming them and in showing off the school. You might, for example, begin the day by sending the visitors to an assembly with their hosts for "ice breakers" and a slide show of the school. Hosts then take visitors to their regular classes. It is imperative that teachers cooperate in creating interesting classes that demonstrate their respective disciplines. Treat students to lunch, hold a student body meeting, an entertainment performance, or athletic demonstration and conclude the day with a question and answer session. This type of day which demands student involvement is a very successful tool in letting prospective students know about your school and the type of education offered.

PART V

How Does the Development Director Thrive?

Know the Priorities

The tasks described in the central section of this booklet may seem impossible to accomplish without an eighty hour work week. The secret to completing the various jobs required of an individual staffing a one-person development office is to know that it is impossible to complete all of the above in the first or even second or third year. Tasks must be prioritized. Clear and realistic goals must be established by the governing group, the principal, and the development director.

Since the annual giving drive occurs every year and builds on past efforts, a general mailing to the constituency is a logical first step in building a development effort. If the school does not have an accurate list of addresses of the alumni, it may be necessary to complete this research step during the first year the office is in existence. Simultaneously, the public relations aspect of the job must remain a priority. Therefore, press releases and the development of standardized public relations materials must be produced with regularity. Recruitment likewise requires immediate and constant attention.

Therefore, if in the first year of starting a development

office, the individual hired is able to start an annual giving campaign, take charge of student recruitment, and initiate an organized public relations effort, that person will have succeeded in setting the foundation for the future and will have adequately performed the job.

Sometimes a pastor or principal thinks that a development director can immediately remedy the financial problems of an institution. This expectation is unrealistic. Unless there is a previous history of a development program in the school, it is unusual for a development office to pay for itself in the first year. The establishment of any program in the school which will produce long term benefits takes extensive time and organization. Once a program is in place, be it an annual giving from alumni or a parent pledge program, its implementation becomes progressively easier after the second or third year and it can be sustained with far less time and energy. Additional projects can then be undertaken. In trying to complete too many projects at one time, the development director risks not being able to complete any of them well. The challenge of the one-person development office is to maintain a balance among development activities, recruitment and public relations and to increase results in all these areas. This task can only be accomplished by building slowly and solidly and recognizing the limits of what one person can accomplish in a normal work day.

Utilize Volunteers

Volunteers can form a wonderful support system, but they likewise must be organized so that they know what is expected of them. Creating job descriptions for committee heads can often spell the difference between a successful volunteer effort and one that fails. The development director must maintain enough control over the volunteers to guide them while still giving them enough freedom to be satisfied. If people feel that they have a definite purpose in joining in a volunteer activity and realize what will be required of them, they will feel that they have contributed and they will continue to help.

Volunteers can help with mailings, special events, a phonathon, secretarial work and recruitment. However, organization on the part of the development director is

crucial. Working with volunteers, while important, can sometimes be extremely frustrating. Occasionally they disappoint you, do not appear when needed, or are reluctant to chair an activity. Nevertheless, they still need to be involved and appreciated for the many times they give support and help. Dealing with volunteers can be a very rewarding experience if you can create a sense of comradarie, if you can make participation in the project fun, and if you can make volunteers feel important.

Create Other Support Systems

The other support systems for the one-person development office come from staff members—the principal, school staff, and the faculty. It can be an isolated and lonely feeling handling the responsibilities of the development office as well as those activities which relate to recruitment and public relations. If the director of development is looked upon as an integral member of the school community and can receive the backing he or she deserves from that group, the job will be much easier. Faculty should be willing to lend a helping hand and to share their expertise when possible. The principal needs to keep the faculty informed of the efforts of the development office. Together, all can create a mutual support system. Parents, as well as students, should be aware of the development goals and of their part in attaining these goals.

Networking with the outside community can likewise provide assistance to the development director. A great part of a successful development effort depends on the people you know and, of those, which ones are willing to help your school. The more connections that are created, the more support from various resources can be gathered.

Networking with other Catholic school development directors can also become a source of understanding, ideas, resources and encouragement. In many areas of the country, development directors have initiated such associations. Some of these groups conduct seminars, provide workshops for new development directors, and work on collaborative public relations projects.

The development director may also decide to join one or two well-chosen civic groups. Joining such groups may demand volunteer time on the part of the development

director, but this time can be well spent when considering connections that are made among leaders of the business community. Experiencing how other service groups organize their offices, conduct programs, recruit volunteers, and solicit funds are great sources of ideas for the development director setting up his or her own office. By reaching out beyond the confines of the one-person development office, the development director can become revitalized for his or her own projects.

Organizations such as the National Catholic Development Conference and The National Catholic Educational Association as well as consultants and private firms continue to provide publications, workshops, and conventions to generate new ideas and provide the latest information on development. Joining these professional groups and attending conferences can provide helpful information and reaffirm the fact that a school's programs are headed in the correct direction.

At times, making comparisons between a well-established development office in a school which started in development ten years ago or with a university with an advanced development program is inevitable. The only purpose for such comparisons is to look at what can be accomplished after a number of years and to realize that it takes a long time for these programs to begin to produce results. The time needed to develop effective programs will differ from school to school. As publications become more frequent and extensive, the recruitment campaign more finely tuned, and the solicitation of donors more sophisticated, the necessity of adding personnel to the development effort will be inevitable. As revenue is generated, the need to increase the funding for the operations of the development office will be the next logical step in the growth of the program. Bringing in part-time secretarial help may be the first step in the expansion of the office. The addition of a recruitment director will allow the development director to focus more attention on bringing revenue into the school. Eventually the amount of paper work generated will demand the expansion of the secretary's hours to full time or the hiring of an assistant. A school must realize that as more revenue is generated, the one-person development office can no longer function because the work load will be too great. The one-person office works while development programs

are being established. If they are successful, inevitably more personnel will be needed.

Have Realistic Expectations

The development director of a one-person office should not be expected to meet budget deficits. The amount of revenue expected should be based on realistic assessments of the situation. How large is the school's constituency? What are the socio-economic factors in the school's community? How accurate is the school's data on the constituency? What previous history exists for development? What is the level of affluence and influence among the people in leadership positions in the governing groups? Who are the potential major donors? What gift level is possible? A pastor or principal may have reasonable expectations of revenue based on the answers to these key questions.

Reasonable goals must be set in light of the giving capability of the constituency and limitations on time and work loads. Unrealistic expectations only lead to feelings of frustration and unfair goals.

In no way should the development director be expected to begin a capital campaign during the first years of an office's operation. A capital campaign should be initiated after a development effort has already been in place for a period of time, after major donors have been involved, and after the constituency is sufficiently informed, impressed and involved for a capital campaign.

Fundraising activities such as auctions, casino nights, or drives should be given to another group to facilitate. These activities often require tremendous energy and planning. The focus of a development effort must be broader than specific fundraising activities.

The development director must be given support and encouragement as well as be directly involved in the setting of annual goals and objectives. The development director should be encouraged to foster and maintain all the aspects of the one-person office simultaneously, for each component—development, public relations, and recruitment—helps the other.

The development office is integral to the affairs of the school, and the director must be informed about events that

affect the public image of the school. He or she must be trusted and must be connected to the administration though regular meetings. Not all development projects will be successful, but much can be learned even from those development efforts which fail to meet their goals. The director should be encouraged to keep trying new ideas in conjunction with establishing programs which have been proven to be effective, such as the annual giving campaign.

As time goes on and programs become established, it will be necessary to expand the office. Such expansion will allow the director to investigate more ways to bring revenue into the school, to strengthen student enrollment, and to create more effective media campaigns.

The position of development director is demanding, but the rewards are evident in a more secure financial situation and a well-established development program. An effective department can expect the development of a constituency that supports the school, a recruitment program which brings students into the school, and a public image that reflects the school's achievements.

APPENDIX A
Director of Development: Sample Job Description

Purpose of position: To take a leadership role in the school by implementing the development activities, including the annual giving campaign, the student recruitment program, and the public relations program.

Reports to: Principal

Major Responsibilities:

A. In the area of development

1. To maintain a development office and organize all development activities
2. To conduct an annual giving program with alumni, parents, past parents, friends and businesses
3. To prepare and implement the direct solicitation program
4. To write proposals to foundations and corporations
5. To work with the governing group and development group
6. To research individual and corporate sources of potential donations

B. In the area of public relations and student recruitment

1. To serve as the public relations agent for the school
2. To promote major school events

3. To design and implement an annual student recruitment program
   - To communicate with feeder programs, the school community, and the general public in order to maintain and/or increase student enrollment
   - To organize and implement student recruitment activities, including Open House and other special events
4. To develop and update promotional materials
5. To publish the school newsletter, annual report, alumnae news
6. To prepare media releases

APPENDIX B
Phonathon Correspondence

Immediately after the phone contact, the school mails a response to each person contacted. Examples follow:

• For Those Who Pledged a Specific Amount

"Thank you for your pledge of $_____ toward this year's annual giving campaign goal of $_____. The (school name) students, families, faculty and parish are grateful for your participation. Our campaign ends (date). God bless you.

• For Those Who Said They Might Donate But Did Not Specify an Amount

"Thank you for considering a gift to our annual giving campaign goal of $ _____ . It takes many of us to make quality Catholic education a reality. Our campaign ends (date). We were pleased to talk with you and we welcome your involvement in our campaign."

• For Those Who Said They Would Not Donate

Thank you for the opportunity to speak to you about the annual giving campaign for (school). We ask that you keep this project in your prayers and if your circumstances change, we would welcome your donation. Our campaign ends (date). Thank you.

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